

EIKON DOCUMENTS 2007

USER'S GUIDE

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AUDIENCE

This guide's purpose is to support the user on document insertion, document modification and document retrieval, using the Eikon® Documents web interface.

This guide, therefore, is not intended for development and deployment of new ECM - *Enterprise Content Management* – applications. The Administrator's Guide should be used for that purpose.

For special customizations and integration with other enterprise applications, developers should consult the application programming interface – API documentation.

SOFTWARE CONFIGURATION

The text of the guide matches release 2.9.6 of the Eikon® Documents software.

GETTING MORE INFORMATION

Visit Eikon's web site: www.eikon.com.br

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INTRODUCTION

Eikon® Documents is application software that manages the storage and retrieval of all organization's controlled documents.

Eikon® Documents is used to deploy ECM - *Enterprise Content Management* and/or EDM - *Electronic Document Management* systems. The systems' users can access authorized documents using the software standard web interface or by using especially customized applications.

The standard web interface is accessible through any browser compatible with the following W³C standards: HTML 4.01, CSS1 and DOM1. Among others, these browsers meet those standards: Microsoft® Internet Explorer® 6+ and Firefox 2+. Obviously, the browser must have network connection, via an intranet or extranet, to the site that hosts the Eikon® Documents server software.

The **SOFTWARE WEB INTERFACE BEHAVES DIFFERENTLY FOR EACH USER**, and the content displayed is automatically formatted by the software at the beginning of each working session. Such content may change when changes occur in the settings established by the **APPLICATION ADMINISTRATOR**. In the context of this guide, the Application Administrator is to be understood as the professional or professionals, responsible for the organization ECM / EDM applications.

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The purpose of this guide is to explain how the software standard web interface can be used. You might start by reading Chapter 2 which introduces the basic concepts of the software product. Chapter 3 describes how to use the web interface.

2

BASIC CONCEPTS

Main functionalities. The concept of a document. Controlling user access. Using folders as shortcuts to documents. Automated document lists. Performing a quick search. Searching for file content. Assigning tasks. Associating documents.

WHAT EIKON DOCUMENTS DOES?

Eikon® Documents automates all important tasks related to the safe storage and retrieval of enterprise digital documents. The most important of those tasks, perhaps, is the complete elimination of the need to know the name of every document file that needs to be retrieved and where it is actually stored.

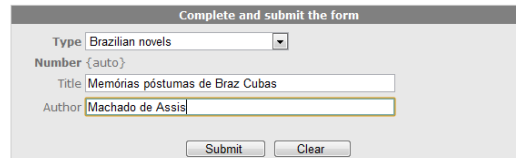
Any user using the software may create a new document and never need to worry about the physical location to store it and how to name it.

Everything that the software user needs to do is identify their properties - *called attributes in the software parlance*, by filling in the form developed specifically for each document class.

CLASSES are collections of documents that share similar logical characteristics. Examples: drawings, invoices, letters, etc. See on next page the example of a new document filled form for the class **BOOK** to be inserted at state **REGISTERING** of the life cycle.

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ADD BOOK [REGISTERING]



Complete and submit the form

Type: Brazilian novels

Number: {auto}

Title: Memórias póstumas de Braz Cubas

Author: Machado de Assis

Submit Clear

The above form is the result of the configurations set by the *Application Administrator*, who established that each book should be identified by the grouping of the values for the attributes **TYPE AND NUMBER** - *which labels appear in bold*. In this case, the value assigned for the attribute Number of each new document should be automatically generated by the software.




As soon as the attributes values have been sent to the server, records will be added to the database, thus beginning the life cycle of the new document.

The new document, once created, becomes available for retrieval by authorized users, through the informed values of attributes. Only users duly authorized by the Application Administrator will have permission to access, create and modify its contents.

WHAT IS A DOCUMENT?

A document is the **BASIC UNIT OF INFORMATION** of interest to an organization. In the Object Model implemented by the Eikon® Documents software, a document is formed by its contents - *files* - and its metadata - *attributes*. Take the example of a document of the **BOOK** class, viewed through the web interface:

BOOK: RB-0031

Files			
Name	Type	Size	Reserved
 Memórias Póstumas de Braz Cubas.pdf	Adobe Acrobat Document	413 kB	 
Attributes			
Class: Book			
Type: Brazilian novels			
Number: 0031			
Title: Memórias póstumas de Braz Cubas			
Author: Machado de Assis			
State: Registering			

CONTENTS

The document contents may consist of **ZERO, ONE OR MORE FILES**. These files are created, viewed, annotated or modified by specific programs, outside of the scope of the Eikon® Documents software. Eikon® Documents applications may include integration with content authoring tools.

Contents examples: letters and specifications produced by word processors, financial plans made using spreadsheet software, CAD drawings, scanned paper documents, digital photos, MP3 music files, etc.

METADATA

Metadata is data about other data. The metadata of an Eikon® Documents document includes attribute values following the rules established by the Application Administrator for its respective document class. It also includes other attributes created and maintained automatically by the software, like document class identification, document name, document description, current state within the *document class life cycle* and data about user events regarding that document.

The attributes set by the Application Administrator for a specific document class must ensure the unique identification of each document within that class, enable its easy location and retrieval and, if applicable, the correct control of document versions.

VERSIONS

Some document classes, under the Application Administrator criteria, may require the concept of versions. For each of those classes, the Application Administrator must establish a rule to define which attribute values should be concatenated to define the document version value.

In the Eikon® Documents Object Model, different versions of a document correspond to different document instances that happen to have the *same value for the name* and *different value for the version*.

PERMISSIONS

Permissions granted by the Administrator regulate what can be done by each user.

The Eikon® Documents Object Model implements the paradigm of permissions to control the insertion, modification, search and retrieval of stored documents. The permissions, which are created and modified only by the Administrator(s), define how a particular user can interact with documents currently in a particular state of that document class life cycle.

An individual permission is assigned to a **SINGLE STATE OF THE DOCUMENT CLASS LIFE CYCLE** and to a **SINGLE USER GROUP**. Any permission has the following properties:

- type - *full, read-only or limited read-only*
- duration - *permanent or temporary*
- status - *active or inactive*

Selected file types can be considered as of restricted retrieval, at the discretion of the Application Administrator. Thus, users who only have limited read-only permissions are prevented from accessing these file types.

Every user may belong to **ONE OR MORE GROUPS**. As a result, the permissions available for a certain user are the same permissions set for the groups wherever the user belongs as member.

A user can have, on the basis of being a member of several groups, more than a single permission granted to a particular state of the document class lifecycle. The stronger permission always prevails.

PERFORMING A QUICK SEARCH

Entering a simple **SEARCH STRING**, the user can quickly find all documents that contain that search string in their metadata. Only documents for which the user has active access permission will be retrieved.

In the following example the user has ran a quick search using the string **LIMA**.

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Search

All Document Metadata

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

Generate report

QUICK SEARCH FOR [LIMA] ON ALL DOCUMENT METADATA

Only last version

4 selected documents, in order of [Last Update]

	Class	Name	Version	State	Description	Last update
	R	Book	CB-0002	Released	Nova Califórnia-Lima Barreto	08/04/2011 10:56:52
		Book	RB-0020	Released	O Cemitério dos Vivos-Lima Barreto	14/05/2010 11:24:55
		Book	RB-0018	Released	Clara dos Anjos-Lima Barreto	14/05/2010 11:24:54
		Book	RB-0015	Released	Os Bruzudangas-Lima Barreto	14/05/2010 11:24:52

SEARCH FOR FILE CONTENTS

Since Eikon® Documents Release 2.9.3 and provided that this optional feature has been sanctioned by the Information Technology area of your organization, every user can find documents by searching text inside their searchable files.

The searchable files of any document are usually those file types based on textual information, such as PDF and Microsoft® Office® files. For more details, check the Information Technology area of your organization.

A user can only retrieve files belonging to the contents of authorized documents.

Search

File Contents

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

SEARCH BY CONTENT [PALMEIRAS]

6 selected files, ordered by rank.

	Class	Name	Version	State	Description	Rank	File	Size
	Book	RB-0021	Released		Iracema-José de Alencar	4	IRACEMA.pdf	404 kB
	Book	RB-0006	Released		A carne-Júlio Ribeiro	1	ACARNE.pdf	378 kB
	Book	RB-0021	Released		Iracema-José de Alencar	1	iracema.rtf	296 kB
	Book	RB-0010	Released		Memórias Póstumas de Brás Cubas-Machado de Assis	0	brascubas.pdf	401 kB
	Book	RB-0008	Released		O Cabeleira-Franklin Távora	0	o_cabeleira.pdf	374 kB
	Book	RB-0020	Released		O Cemitério dos Vivos-Lima Barreto	0	o_cemiterio_dos_vivos.rtf	397 kB

SENDING AND RECEIVING TASKS

Tasks streamline shared processes – *collaboration* - and the distribution of documents. All users can submit tasks associated with authorized documents and assign it to other users who share equivalent permissions. The tasks in the Eikon® Documents Object Model comply with the following characteristics:

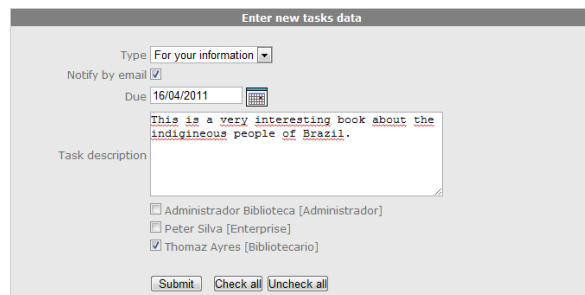
- *One Document*: every task relates only to a single document.
- *Sender / Recipient*: every task has a single sender and a single receiver. However, with a single click in the web interface, any user can send multiple identical tasks to multiple recipients.
- *Due Date*: every task is associated with a deadline.
- *Description*: every task contains a text describing the activities which the sender expects the recipient to accomplish.
- *Type*: every task fit in to one of the following types:
 - ❖ *For your information*: simply informative task about the document.
 - ❖ *Action required*: the sender requires the recipient to perform a change of document state and/or to modify the attributes values or file contents of the document.
- *Notify by e-mail*: should the software send or not an email to the recipient about the task.

On the notification e-mail, the recipient receives an internet address - *URL* - of the document involved, a link that can only be accessed after the user is authenticated and actual user access permissions are verified.

Senders, at the discretion of recipients, can also be notified by e-mail when tasks have been completed.

In the example shown below, the user is assigning tasks informing another user about her enthusiasm for a specific book.

BOOK: RB-0021 - SEND TASKS



Document main page

AUTOMATIC ASSIGNMENT OF TASKS

Since Release 2.9.5 of the software, the Application Administrator can use the **ADVANCED SETTINGS** features in order to schedule the automatic assignment of tasks under certain circumstances, such as:

- Insertion of new document
- Document attributes have changed
- Document contents have changed
- Document state have changed – *performing state transition actions*

Automated tasks may embrace e-mail notification and the Application Administrator may set the default time span - **IN DAYS** – that the recipient has to perform each task sent automatically.

VIRTUAL FOLDERS

Users can create virtual folders for easy document retrieval. Virtual folders are completely independent from the storage system and the physical location of document files.

Virtual folders are used by Eikon® Documents to streamline the retrieval of frequently looked-for documents. Each stored document can be linked to one or more folders. Those links do not imply any document copying; links should be understood as alternative shortcuts to access a document. Eliminating a link from one document to a particular folder has no effect on the actual document storage.

Folders are used as shortcuts for easy access to all documents relating to particular acts or facts of concern to users, such as products, projects, clients, processes, etc.

Eikon® Documents supports **PUBLIC AND PRIVATE** folders, which can be **STATIC OR DYNAMIC**. Public folders are the responsibility of the Application Administrator. *For the procedures for adding, modifying and deleting public folders, see the Administrator's Guide.*


STATIC PUBLIC FOLDERS

Public folders are organized in a hierarchical and unified structure and embody the interests of the entire community of users providing a unified view.

The visible contents of each folder – *linked documents* - change from user to user. What each user may retrieve when *opening* any folder is determined by the corresponding permissions set for each document that is linked to that particular public folder.



Linking documents to public static folders is performed by authorized users, and the same document can be **PUBLISHED** - *linked* - in more than one public static folder. Each publication can be made on a permanent or temporary basis. See the following example:

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout





NEW BOOKS

2 selected documents, in order of [Last Update]

	Class	Name	Version	State	Description	Last update
	Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01
	Book	RB-0021		Released	Tracema-José de Alencar	14/05/2010 11:24:55

15/04/2011 14:39:23

 Mark Folder

 Generate report

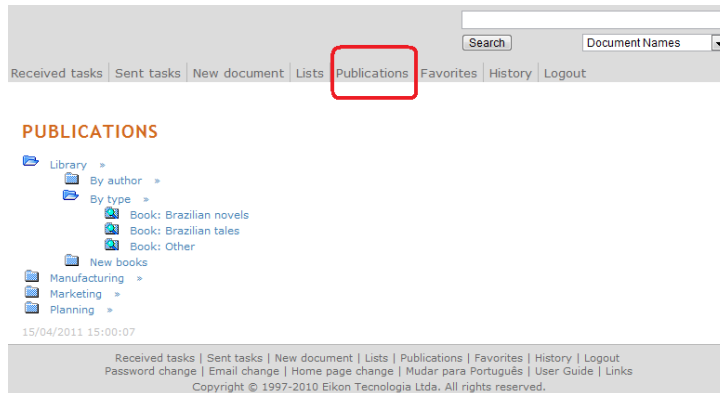
 Up one level

DYNAMIC PUBLIC FOLDERS

Dynamic public folders - **OR SMART PUBLIC FOLDERS** - represent dynamic collections of documents automatically gathered by the software at each *opening* of that kind of folder, based on the stored folder **SEARCH PARAMETERS**.

Dynamic public folders are created and maintained by the Applications Administrator and regular users can only access those that fit into the document classes for which the user has access permissions.

Documents are only presented if their current life cycle state has the procedure parameter **CAN PUBLISH** set as **TRUE**, by the Application Administrator.



The following example shows the result of *opening* the public dynamic folder **BRAZILIAN NOVELS**. This folder was created by the Application Administrator to collect, automatically, all documents belonging to *the BOOK* document *class*. This folder was created as a subfolder of the static public folder called **LIBRARY**.

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 **BOOK: BRAZILIAN NOVELS**

[Show parameters](#)
[Generate report](#)
[Up one level](#)

Only last version

17 selected documents, in order of [Last Update]

	Class	Name	Version	State	Description	Last update
	Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01
	Book	RB-0021		Released	Iracema-José de Alencar	14/05/2010 11:24:55
	Book	RB-0020		Released	O Cemitério dos Vivos-Lima Barreto	14/05/2010 11:24:55
	Book	RB-0019		Released	A Condessa Vésper-Aluizio de Azevedo	14/05/2010 11:24:54
	Book	RB-0018		Released	Clara dos Anjos-Lima Barreto	14/05/2010 11:24:54
	Book	RB-0017		Released	Cinco minutos-José de Alencar	14/05/2010 11:24:54
	Book	RB-0016		Released	Casa de pensão-Aluizio Azevedo	14/05/2010 11:24:53
	Book	RB-0015		Released	Os Bruzudangas-Lima Barreto	14/05/2010 11:24:52
	Book	RB-		Released	Aventuras de Diófanos-Tereza Margarida	14/05/2010


STATIC PRIVATE FOLDERS

Static private folders represent static collections of documents established by a particular user. Any authorized user can create any number of folders and can link each folder to any number of documents. Each folder must have a unique name, different from other folders names for the same user.

The user private folders are not visible by other users. However, the documents that are linked to those folders are still accessible by other users, which may link them to their own folders.

See the following example wherein the user created a folder and linked three documents at his/her sole discretion.

[Received tasks](#) | [Sent tasks](#) | [New document](#) | [Lists](#) | [Publications](#) | [Favorites](#) | [History](#) | [Logout](#)

 **ONGOING WORK**

[Mark Folder](#)
[Change Folder](#)
[Delete Folder](#)
[Generate report](#)

2 selected documents, in order of [Class/Name/Version]

	Class	Name	Version	State	Description	Last update
	Book	RB-0020		Released	O Cemitério dos Vivos-Lima Barreto	14/05/2010 11:24:55
	Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01

15/04/2011 15:06:35

[Received tasks](#) | [Sent tasks](#) | [New document](#) | [Lists](#) | [Publications](#) | [Favorites](#) | [History](#) | [Logout](#)
[Password change](#) | [Email change](#) | [Home page change](#) | [Mudar para Português](#) | [User Guide](#) | [Links](#)
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DYNAMIC PRIVATE FOLDERS

Dynamic private folders - **OR PRIVATE SMART FOLDERS** - represent dynamic collections of documents to be gathered automatically by the software when *opening* each folder based on the stored search criteria. The private dynamic folders fit only to document classes for which the user has access permissions. The user must define a different name for each private dynamic folder belonging to any particular document class and can create as many folders as desired.

The following example shows the result of *opening* the private dynamic folder **NOVELS OF MACHADO DE ASSIS AND LIMA BARRETO**. This folder was created by the user to collect, automatically, all documents within the **BOOK** document class of this particular kind and written by both cited authors.

Received tasks
Sent tasks
New document
Lists
Publications
Favorites
History
Logout


BOOK: NOVELS OF MACHADO DE ASSIS AND LIMA BARRETO

Only last version

7 selected documents, in order of [Last Update]

	Class	Name	Version	State	Description	Last update
	Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01
	Book	RB-0020		Released	O Cemitério dos Vivos-Lima Barreto	14/05/2010 11:24:55
	Book	RB-0018		Released	Clara dos Anjos-Lima Barreto	14/05/2010 11:24:54
	Book	RB-0015		Released	Os Bruzundangas-Lima Barreto	14/05/2010 11:24:52
	Book	RB-0011		Released	Iaiá Garcia-Machado de Assis	14/05/2010 11:24:50
	Book	RB-0010		Released	Memórias Póstumas de Brás Cubas-Machado de Assis	14/05/2010 11:24:50
	Book	RB-0009		Released	Dom Casmurro-Machado de Assis	14/05/2010 11:24:49

Show parameters


Change parameters


Delete Search

Generate report

15/04/2011 15:08:10

Received tasks
Sent tasks
New document
Lists
Publications
Favorites
History
Logout

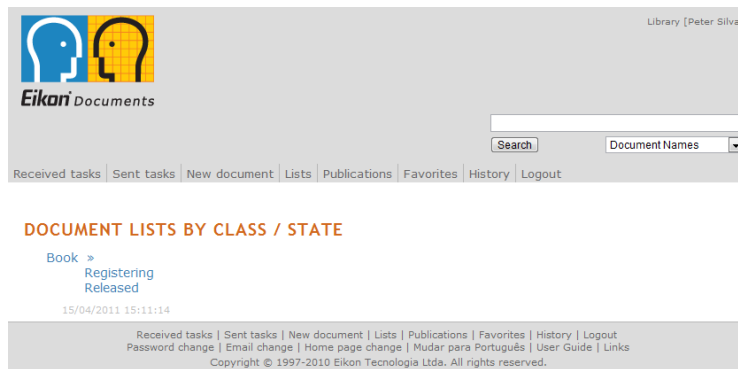
Password change
Email change
Home page change
Mudar para Português
User Guide
Links

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DOCUMENT LISTS

The software web interface presents lists of documents organized by class and life cycle states.

Starting on Release 2.9.5 of the software, users of the web interface – *without having to use folders* - can straightforwardly access all the authorized documents by simply consulting lists constructed by classes and their life cycle states.



Note that the user will only be able to access lists of document classes and states for which the user has access rights.

To access the document list of interest, simply click on the desired link. Clicking the name of a document class, we obtain all authorized documents in that class. By clicking the name of a state what is acquired are only authorized documents in that state.

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Generate report

DOCUMENT LIST OF CLASS BOOK

Filter [Document name] by

Only last version

24 selected documents, in order of [Class/Name/Version]

Page 1 / 2 (20 page items)

1 2 Next

	Class	Name	Version	State	Description	Last update
	Book	CB-0001		Released	O Alienista-Machado de Assis	15/12/2010 09:55:05
R	Book	CB-0002		Released	Nova Califórnia-Lima Barreto	08/04/2011 10:56:52
	Book	FHB-0003		Released	A carta de Pero Vaz de Caminha-Pero Vaz de Caminha	14/05/2010 11:24:45
	Book	FHB-0004		Released	A carta de Mestre João Faras-Mestre João Faras	14/05/2010 11:24:46
	Book	ME-0005		Released	A ALMA ENCANTADORA DAS RUAS-João do Rio	14/05/2010 11:24:46

Generate report

DOCUMENT LIST OF CLASS BOOK AT STATE RELEASED

Only last version

23 selected documents, in order of [Class/Name/Version]

Page 1 / 2 (20 page items)

1 2 Next

	Class	Name	Version	State	Description	Last update
	Book	CB-0001		Released	O Alienista-Machado de Assis	15/12/2010 09:55:05
R	Book	CB-0002		Released	Nova Califórnia-Lima Barreto	08/04/2011 10:56:52
	Book	FHB-0003		Released	A carta de Pero Vaz de Caminha-Pero Vaz de Caminha	14/05/2010 11:24:45
	Book	FHB-0004		Released	A carta de Mestre João Faras-Mestre João Faras	14/05/2010 11:24:46
	Book	ME-		Released	A ALMA ENCANTADORA DAS RUAS-João do	14/05/2010

GENERATING REPORTS

Since Release 2.9.4, Eikon® Documents users can generate reports for later handling and printing. Reports are available on the following formats: HTML and Microsoft® Excel® - XLS. This feature is available for: public folders, private folders, quick searches and user events history and document pages.

To generate reports on the documents linked to a folder, the user can filter the contents of the report based on the following criteria:

- Only the latest or all the available authorized versions of the documents linked to that folder.
- Type: SUMMARY - *only class name, version, status, description and last update* - or COMPLETE - *including also the other attributes of each document*.

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- Filter by state: all states or only a specific state.

Library [Peter Silva]

Eikon Documents

Search [] Document Names [v]

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

Show parameters
Generate report
Up one level

BOOK: MACHADO DE ASSIS

Only last version
5 selected documents, in order of [Last Update]

	Class	Name	Version	State	Description	Last update
	Book	RB-0031		Released	Memórias póstumas de Brás Cubas-Machado de Assis	15/04/2011 14:59:01
	Book	CB-0001		Released	O Alienista-Machado de Assis	15/12/2010 09:55:05

GENERATE REPORT FOR SEARCH [BY AUTHOR - MACHADO DE ASSIS]

Complete and submit the form

Report name: By author - Machado de Assis

Only last version: ☒

File Type: Excel

Content Type: Summary only

Filter by state: Released

Order by: Class/Name/Version

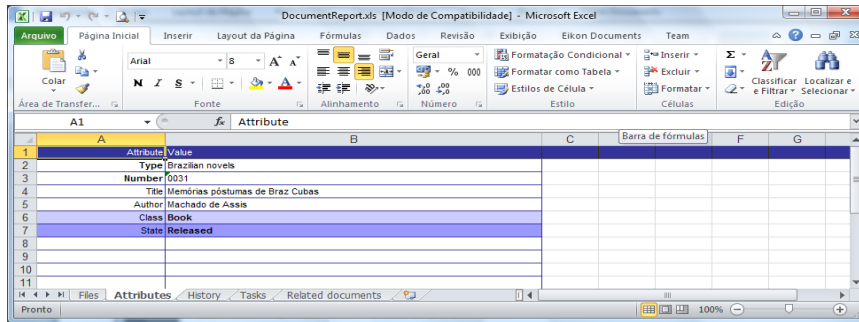
Submit

Report (2).xls [Modo de Compatibilidade] - Microsoft Excel

	A	B	C	D	E	F	G	H
	Class	Name	Version	State	Description	Last update		
1	Book	RB-0006		Released	A carne-Júlio Ribeiro	14/05/2010 11:24:46		
2	Book	RB-0007		Released	O Ateneu-Raul Pompéia	14/05/2010 11:24:47		
3	Book	RB-0008		Released	O Cabelo-Franklin Távora	14/05/2010 11:24:48		
4	Book	RB-0009		Released	Dom Casimiro-Machado de Assis	14/05/2010 11:24:49		
5	Book	RB-0010		Released	Memórias Póstumas de Brás Cubas-Machado de Assis	14/05/2010 11:24:50		
6	Book	RB-0011		Released	Isaí Garcia-Machado de Assis	14/05/2010 11:24:50		
7	Book	RB-0012		Released	A pata da gazela-José de Alencar	14/05/2010 11:24:51		
8	Book	RB-0013		Released	O novigo-Martins Pena	14/05/2010 11:24:51		
9	Book	RB-0014		Released	Aventuras de Diófares-Tereza Margarida da Silva e Orta	14/05/2010 11:24:52		
10	Book	RB-0015		Released	Os Bruzundangas-Lima Barreto	14/05/2010 11:24:52		
11	Book	RB-0015		Released	Os Bruzundangas-Lima Barreto	14/05/2010 11:24:52		

By type - Brazilian novels - On

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ASSOCIATING DOCUMENTS

Since Release 2.9.4, all authorized Eikon® Documents users can create relationships between any document and other documents previously selected. The prerequisite is that the user should have full permission to the current state of the document being referenced. In the figure below, the user can see if there are any other documents associated to the document that is presented on the screen.

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

BOOK: RB-0020

Files			
Name	Type	Size	Reserved
o_cemiterio_dos_vivos.rtf	Formato Rich Text (RTF)	397 kB	
o_cemiterio_dos_vivos.zip	Zip	128 kB	

Attributes

Class	Book
Type	Brazilian novels
Number	0020
Title	O Cemitério dos Vivos
Author	Lima Barreto
State	Released

15/04/2011 15:28:06

Send tasks
Show publications
Show related documents
Show history
Show tasks
Generate report

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout


BOOK: RB-0020 - RELATED DOCUMENTS

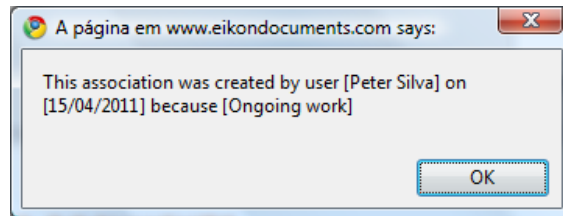
There is available one related document

Class	Name	Version	State	Description	Last update	
Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01	

Document main page

Eikon Documents 2007 User's Guide

The user can find out the motive behind any particular association by clicking the on the icon  .



USING THE WEB INTERFACE

The web interface is the unified access portal to the organization documents through a familiar interface for Web users.

The Eikon® Documents standard web interface implements a unified access portal for all organization controlled documents. After the Server software validates her login information, the user initiates her work session accessing her specific work environment, automatically formatted for her.

Eikon® Documents WEB user interface can be extended through specific customizations for each ECM/EDM application. For more information about specific implementations, please contact your Application Administrator.

CHOOSING YOUR HOME PAGE


Each user can define which should be her Home Page in Eikon® Documents, choosing among Received Tasks, Sent Tasks, History, Publications, Favorites or Lists.

The image below presents a user portal where Received Tasks was set as Home Page.

Eikon Documents 2007 User's Guide

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

Generate report

 **RECEIVED TASKS**

Due from 10/04/2011 until 24/04/2011 Only not completed Include "AUTO" Submit

1 selected task

Due	From	Type	Task	Document	Description	State	Status
18/04/2011	Librarian	For your information	This is a very interesting book.	Book: RB-0031	Memórias póstumas de Braz Cubas-Machado de Assis	Released	


17/04/2011 11:45:16

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout
Password change | Email change | Home page change | Mudar para Português | User Guide | Links
Copyright © 1997-2010 Eikon Tecnologia Ltda. All rights reserved.

CHANGING THE INTERFACE IDIOM TO PORTUGUESE


Since Release 2.9.5 of the software any web interface user can choose between English and Portuguese. Just click on the **MUDAR PARA PORTUGUÊS** link on the secondary menu as show in the figure below. After clicking the link, the user must *login* again to see the interface already in the new idiom.

Library [Peter Silva]



Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

Generate report

 **RECEIVED TASKS**

Due from 10/04/2011 until 24/04/2011 Only not completed Include "AUTO" Submit

1 selected task

Due	From	Type	Task	Document	Description	State	Status
18/04/2011	Librarian	For your information	This is a very interesting book.	Book: RB-0031	Memórias póstumas de Braz Cubas-Machado de Assis	Released	

17/04/2011 11:47:55

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout
Password change | Email change | Home page change | **Mudar para Português** | User Guide | Links
Copyright © 1997-2010 Eikon Tecnologia Ltda. All rights reserved.

To change back to English from the Portuguese web interface, just click the link **CHANGE TO ENGLISH**.

PRESENTING THE INTERFACE

Once the software is installed, Eikon[®] Documents standard Web interface becomes available through intranet or extranet.

CUSTOMIZATION

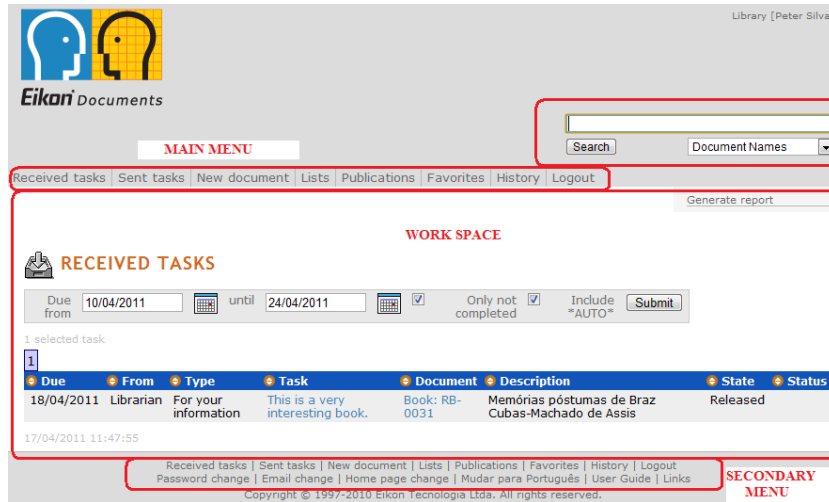
Since release 2.8 of the software, the web interface can be customized in many ways, changing its looks and feel, but preserving its structure and content. Customization can be done either during the software installation, or thereafter.

Specially terms like “public”, “private”, “static”, “dynamic” and “lists” can be changed for others, more adherent to the company's business characteristics. In this user guide the following changes were used:

Original term	Term used
Public folders	Publications
Private folders	Favorites
Static folder	Folder
Dynamic folder	Search
Lists	Lists

FORMAT

The portal window is divided in three main areas: main menu, work space and secondary menu.



MAIN MENU

The main menu area has the following options:

- Quick search, file content search (
- Received tasks
- Sent tasks
- Include a new document - *depending on rights and permissions set by the Application Administrator*
- Access to document lists by document class / state
- Access to the public folders structure
- Access to navigation and creation of private folders

- User history
- Close a work session

SECONDARY MENU

The secondary menu area has the following options:




- Preferences settings - *home page, e-mail and password* ,
- *Links* for direct access to web pages chosen by the Administrator,
- Document classes' configuration, file types, user and permission management, catalog import / export - *only if the user is an Application Administrator*.

WORK SPACE

The work space area is used to present lists of documents selected according to the user activities. It may also present the details of a document selected in a prior list, or a form to input or change documents or private folders.

ICONS

The table below presents the standard icons used in the standard web interface and its meaning:

Icon	Meaning
<hr/>	
	Private dynamic folder
<hr/>	
	Private static folder
<hr/>	
	Public dynamic folder
<hr/>	



Private static folder



Static folder selection mark



New content



Delete



More details...



Document link exclusion



Properties



Document link



New task



File download



File *Check-out*



File *check-out* cancelation



Check-in changed file

QUICK SEARCH

By typing a simple search **text** string, a user can quickly retrieve all documents that satisfy the following conditions:

- The user has access rights to the document

AND

- The **SEARCH STRING** is contained
 - In documents names

OR

- In documents states names

OR

- In documents descriptions

OR

- In all documents attributes values

OR

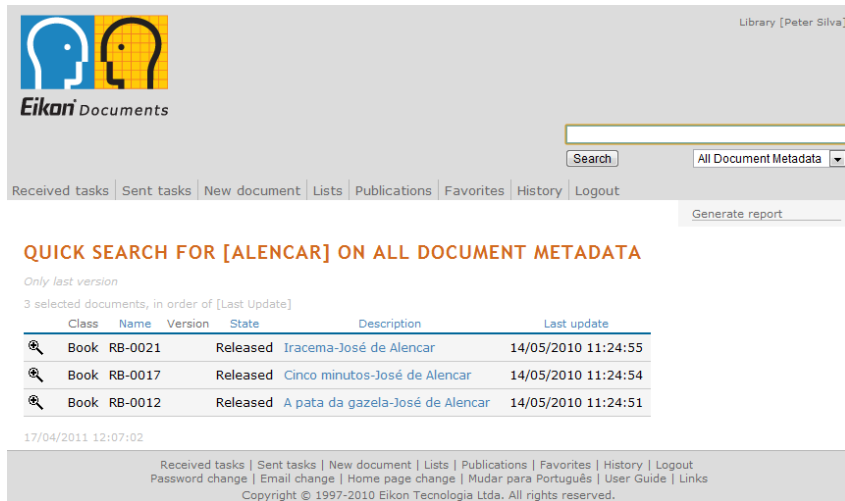
- In documents files names

OR

- In all documents metadata.

The search for documents that satisfy the above conditions is run on all existing document classes, respecting the access permissions set for the user running the search. For a quick search, a user must select the kind of desired search and then type the search text string in the box on top of the menu, and finally click the **[Search]** button. See example below:

Eikon Documents 2007 User's Guide



Library [Peter Silva]

Eikon Documents

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

Generate report

QUICK SEARCH FOR [ALENCAR] ON ALL DOCUMENT METADATA

Only last version

3 selected documents, in order of [Last Update]

	Class	Name	Version	State	Description	Last update
🔍	Book	RB-0021		Released	Iracema-José de Alencar	14/05/2010 11:24:55
🔍	Book	RB-0017		Released	Cinco minutos-José de Alencar	14/05/2010 11:24:54
🔍	Book	RB-0012		Released	A pata da gazela-José de Alencar	14/05/2010 11:24:51

17/04/2011 12:07:02

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout
Password change | Email change | Home page change | Mudar para Português | User Guide | Links
Copyright © 1997-2010 Eikon Tecnologia Ltda. All rights reserved.

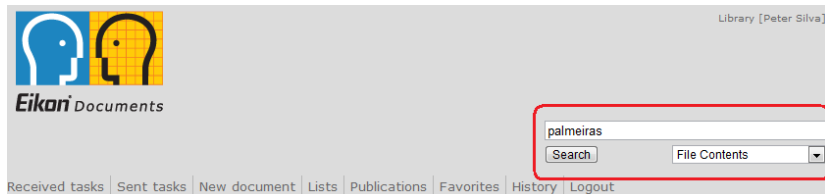
FILE CONTENT SEARCH

If this functionality is enabled by the IT area, all users can locate and retrieve documents searching for **SEARCH TEXTS** within the content of searchable document files.

Searchable files, usually, are text based content files, such as PDF and Microsoft® Office® created files. For more details, please contact your IT area.

Only documents that the user has access permission are retrievable.

To search by file content, just type the **SEARCH STRING**, select the *File Contents* option and click *Search*. Search doesn't differentiate capitalized letters. No language specific signs or special accents are considered.



Library [Peter Silva]

Eikon Documents

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

palmeiras

Search File Contents

Eikon Documents 2007 User's Guide

Files that contain the search string will be listed, **RANK-ORDERED**, with a direct link to the document's main page. Rank is established by Windows® indexing engine, and basically includes how many times the search string was found within the file.

SEARCH BY CONTENT [PALMEIRAS]

6 selected files ordered by rank.

	Class	Name	Version	State	Description	Rank	File	Size
	Book	RB-0021		Released	Iracema-José de Alencar	6	IRACEMA.pdf	404 kB
	Book	RB-0006		Released	A carne-Júlio Ribeiro	1	ACARNE.pdf	378 kB
	Book	RB-0021		Released	Iracema-José de Alencar	1	iracema.rtf	296 kB
	Book	RB-0010		Released	Memórias Póstumas de Brás Cubas-Machado de Assis	0	brascubas.pdf	401 kB
	Book	RB-0008		Released	O Cabeleira-Franklin Távora	0	o_cabeleira.pdf	374 kB
	Book	RB-0020		Released	O Cemitério dos Vivos-Lima Barreto	0	o_cemiterio_dos_vivos.rtf	397 kB

TASKS

Tasks are always associated to a specific document. To send one or more tasks, the user must first locate the document which the tasks refer to.

SENDING TASKS

To send one or more tasks, click **SEND TASKS** near the icon  in the document specific command menu.

Eikon Documents 2007 User's Guide

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

BOOK: RB-0020

Files			
Name	Type	Size	Reserved
o_cemiterio_dos_vivos.rtf	Formato Rich Text (RTF)	397 kB	
o_cemiterio_dos_vivos.zip	Zip	128 kB	

Attributes

Class	Book
Type	Brazilian novels
Number	0020
Title	O Cemitério dos Vivos
Author	Lima Barreto
State	Released

Send tasks

Show publications

Show related documents

Show history

Show tasks

Generate report

Fill in and submit the form, clicking the SUBMIT button. See example below:

BOOK: RB-0020 - SEND TASKS

Enter new tasks data

Type

For your information

Notify by email ☒

Due

18/04/2011

Task description

Is there any new edition of this book?

☒ Librarian [Administrador]
☐ Peter Silva [Enterprise]
☒ Thomaz Ayres [Bibliotecario]

Submit

Check all

Uncheck all

Document main page

Tasks will be included in the database, and, if E-MAIL NOTIFICATION box is checked, e-mail messages will be sent after the user clicks *Submit*.

BOOK: RB-0020 - TASKS

2 selected tasks

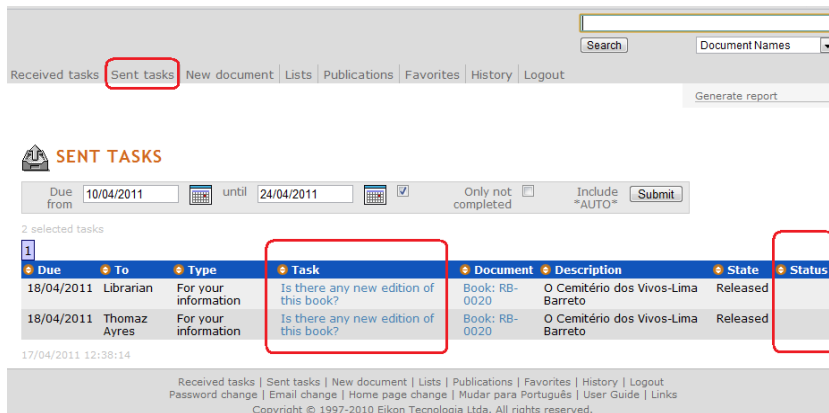
	From	To	Type	Created in	Due	Completed in	Task description	Task email	Status	Response	Response email
	Peter Silva	Thomaz Ayres	For your information	17/04/2011	18/04/2011		Is there any new edition of this book?	Yes	-	No	
	Peter Silva	Librarian	For your information	17/04/2011	18/04/2011		Is there any new edition of this book?	Yes	-	No	

Document main page

CHECKING SENT TASKS

To check sent tasks status, please click on the **SENT TASKS** menu. If the due date of a specific task is prior to today, this task will be marked as *Delayed*.

User can click on the tasks table titles to reorder the task list in ascending or descending order. Clicking on the task description text presents the task page. Clicking the document title – *class/name/version*, presents the document page.



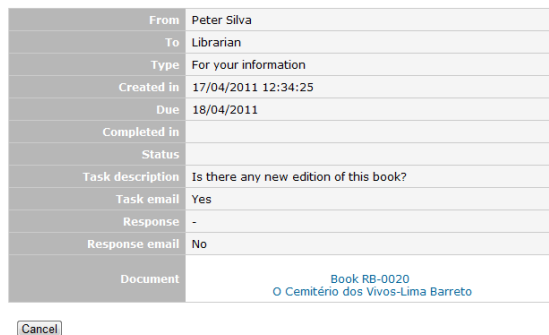
The screenshot shows the Eikon Documents 2007 interface. At the top, there is a navigation bar with the following tabs: Received tasks, **Sent tasks** (highlighted with a red box), New document, Lists, Publications, Favorites, History, and Logout. To the right of the navigation bar is a search box with a 'Search' button and a 'Document Names' dropdown menu. Below the navigation bar is a 'Generate report' button.

Below the navigation bar, there is a section titled 'SENT TASKS' with a calendar icon. This section contains a filter bar with the following options: 'Due from' (10/04/2011), 'until' (24/04/2011), a checkbox for 'Only not completed', and a button for 'Include *AUTO*'. Below the filter bar, it says '2 selected tasks'.

The main part of the screenshot is a table of tasks. The table has the following columns: Due, To, Type, Task, Document, Description, State, and Status. The first two rows of the table are highlighted with a red box. The first row shows a task due on 18/04/2011 to Librarian, with the task description 'Is there any new edition of this book?'. The second row shows a task due on 18/04/2011 to Thomaz Ayres, with the task description 'Is there any new edition of this book?'. The 'Status' column for both tasks is 'Released'.

At the bottom of the screenshot, there is a footer with the following text: 'Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout | Password change | Email change | Home page change | Mudar para Português | User Guide | Links | Copyright © 1997-2010 Eikon Tecnologia Ltda. All rights reserved.'

TASK



The screenshot shows the 'TASK' form. The form has the following fields: From (Peter Silva), To (Librarian), Type (For your information), Created in (17/04/2011 12:34:25), Due (18/04/2011), Completed in, Status, Task description (Is there any new edition of this book?), Task email (Yes), Response (-), Response email (No), and Document (Book RB-0020, O Cemitério dos Vivos-Lima Barreto). Below the form is a 'Cancel' button.

CANCELLING A TASK

The sender of a task can cancel it only if the recipient has not yet posted a reply.

RECEIVING TASKS

The received tasks list may be accessed by clicking the menu **RECEIVED TASKS**. Please note that, at the beginning of every work session, the received tasks list is automatically presented in the portal's work space area, unless the user has chosen a different *Home Page*.

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

Search Document Names

Generate report

RECEIVED TASKS

Due from 10/04/2011 until 24/04/2011 Only not completed Include *AUTO* Submit

1 selected task

Due	From	Type	Task	Document	Description	State	Status
18/04/2011	Librarian	For your information	This is a very interesting book.	Book: RB-0031	Memórias póstumas de Braz Cubas-Machado de Assis	Released	

17/04/2011 12:43:25

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout
 Password change | Email change | Home page change | Mudar para Português | User Guide | Links
 Copyright © 1997-2010 Eikon Tecnologia Ltda. All rights reserved.

To access details of a received task, click on the corresponding description text. To access the document which the task refers to, click on the text identifying it.

REGISTERING THAT A TASK HAS BEEN COMPLETED

The task recipient, once concluding the designed task, shall click on **SUBMIT** button to inform the task sender. If the box *Notify by e-mail* check-box has been marked, the task sender will also receive an e-mail notification.

The task recipient might not accept the task. Just select the option *Task not accepted* and click the **SUBMIT** button, and the task sender will be notified.

The task recipient should also include a comment when registering that the task has been completed.

In case the document, for whatsoever reason, is no longer available for access by the task recipient, select the option *Document unavailable* and click the **SUBMIT** button to notify the task sender.

Eikon Documents 2007 User's Guide

TASK

From	Librarian
To	Peter Silva
Type	For your information
Created in	17/04/2011 11:44:22
Due	18/04/2011
Completed in	
Status	
Task description	This is a very interesting book.
Task email	Yes
Response	-
Response email	No
Document	Book RB-0031 Memórias póstumas de Braz Cubas-Machado de Assis

Please enter the task response and submit

Status: Task completed

☒ Notify by email

Response:

SEARCHING AND RETRIEVING PUBLISHED DOCUMENTS

Published documents are documents linked to static or dynamic public folders.

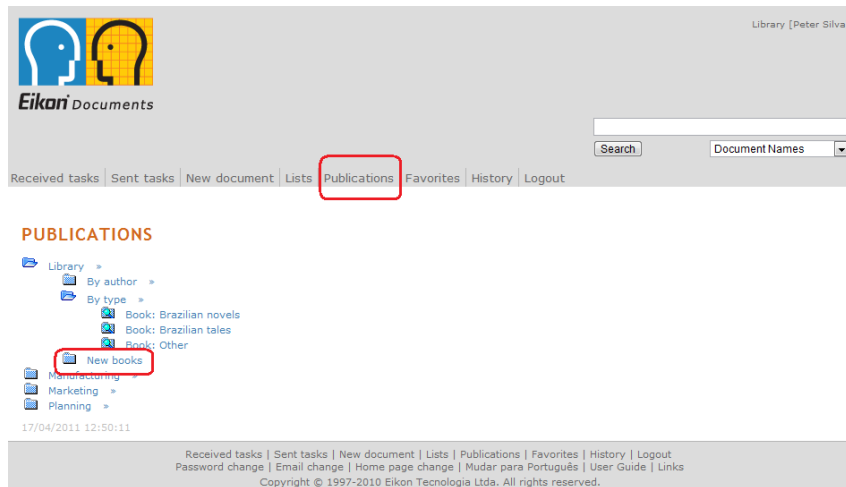
Publishing in static public folders may be temporary or permanent. Publishing a document in static or dynamic public folders depends on a prior *enabling*, by the **Application Administrator**, of the operational procedure **PUBLICATION** for the current state of each linked document.

LINKING DOCUMENTS to public dynamic folders is done automatically, through the match between the dynamic folder search parameters and the documents attributes.

Locating documents linked to public folders is done navigating the public folders hierarchy, which is defined and set by the Application Administrator.

Eikon Documents 2007 User's Guide

To begin to navigate in the public folders hierarchy, click on the menu option **PUBLIC FOLDERS**¹. Click the listed folders names; you may expand or compress the public folders structure.



Clicking the public folder name presents the list of documents linked to it. However, if this folder has sub-folders, the symbol **>>** - *presented just next to the folder name* - shall be clicked to present the list of linked documents.

The screenshot shows the 'NEW BOOKS' section of the Eikon Documents 2007 interface. It displays a list of 2 selected documents, in order of [Last Update]. The list is organized into columns: Class, Name, Version, State, Description, and Last update. The first document is 'Book RB-0031 Released' with the description 'Memórias póstumas de Braz Cubas-Machado de Assis' and a last update of '15/04/2011 14:39:01'. The second document is 'Book RB-0021 Released' with the description 'Iracema-José de Alencar' and a last update of '14/05/2010 11:24:55'.

	Class	Name	Version	State	Description	Last update
	Book	RB-0031	Released		Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01
	Book	RB-0021	Released		Iracema-José de Alencar	14/05/2010 11:24:55

Please note that this list will contain only the documents to which the user has access rights to.

¹ Please note the settings in the examples: **PUBLICATIONS** substitutes the default term **PUBLIC FOLDERS**, **FOLDER** substitutes **STATIC** and **SEARCH** substitutes **DYNAMIC**.

SEARCHING FOR DOCUMENTS

Searching for documents means to locate documents that satisfy user-set search criteria.

First, the **DOCUMENT CLASS** to be searched must be set. This corresponds to pick a class that will be subject to the new search. To create a new private dynamic folder, the user *must click on the document class name* in the work space area.



This will present, in the work space area, a form to be filled in and sent.

ADD SEARCH IN CLASS [BOOK]

Please, enter Search's parameters and name

<input type="button" value="Or"/> <input type="button" value="And"/>	Attribute Operation Type Equal to Number Contains Title Contains Author Contains	Value Brazilian tales
----------------------------------------------------------------------	----------------------------------------------------------------------------------------------	------------------------------------------


[Type] Equal to [Brazilian tales]



Search Parameters

Name

The following image presents the results of *opening* of the just created private dynamic folder.

Received tasks	Sent tasks	New document	Lists	Publications	Favorites	History	Logout
----------------	------------	--------------	-------	--------------	-----------	---------	--------

	BOOK: BRAZILIAN TALES	Show parameters
	<small>Only last version</small>	Change parameters
	<small>2 selected documents, in order of [Last Update]</small>	Delete Search
		Generate report

	Class	Name	Version	State	Description	Last update
	R	Book	CB-0002	Released	Nova Califórnia-Lima Barreto	08/04/2011 10:56:52
		Book	CB-0001	Released	O Alienista-Machado de Assis	15/12/2010 09:55:05

FORM TO CREATE A NEW DYNAMIC PRIVATE FOLDER

To create a new dynamic folder you must define a name and the search criteria for it. Once created, documents that satisfy the search criteria will be automatically listed *every time the folder is opened*. You may, anytime, repeat the search for documents that satisfy the search criteria just by clicking the desired folder name in the menu.

To set each search criteria, follow this procedure:

1. In the line corresponding to the chosen attribute, select the desired **OPERATION**, among options available.
2. In the line corresponding to the chosen attribute, set the desired attribute **VALUE**.
3. In the line corresponding to the chosen attribute, click the **OR** or **AND** buttons to add the new parameter to the search criteria.

Search criteria will be updated by your browser reflecting your input. Click on **CLEAR** to re-initiate the whole process again.

When you conclude the search criteria definition, just inform a text to identify the new folder and click the **SUBMIT** button.

AVAILABLE OPERATIONS

<i>Operation</i>	<i>Meaning</i>
Equal to	Attribute value must be equal to criteria
Different from	Attribute value must be different from criteria
Begins with	Attribute value must begin with criteria
Contains	Criteria must be contained within attribute value
Greater than	Attribute value must be greater than criteria
Less than	Attribute value must be less than criteria
Greater or equal	Attribute value must be greater than or equal criteria
Less or equal	Attribute value must be less than or equal criteria

See the following example:

ADD SEARCH IN CLASS [BOOK]

Please, enter Search's parameters and name

Or	And	Attribute	Operation	Value
		Type	Equal to	Brazilian novels
Or	And	Number	Contains	
Or	And	Title	Contains	
Or	And	Author	Equal to	Lima Barreto

Search Parameters

```
[Type] Equal to [Brazilian novels ]
And [Author] Equal to [Machado de Assis]
Or [Type] Equal to [Brazilian novels ]
And [Author] Equal to [Lima Barreto]
```

Name: Novels of Machado de Assis and Lima Barreto

Submit Clear

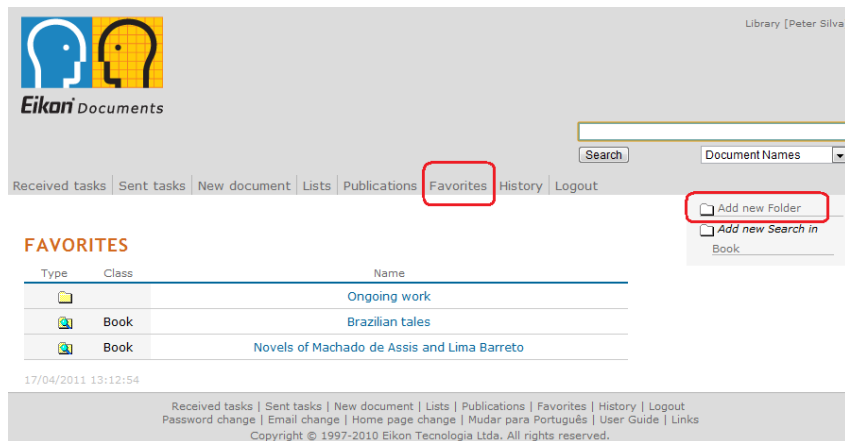
CREATING AND MAINTAINING PRIVATE STATIC FOLDERS

Private static folders contain shortcuts to those documents used more frequently, bringing together different document classes, grouped by topics of interest.




After adding a new static private folder, the user can link the documents of interest. The same document can be linked to more than one folder, as well as one or more static public folders.

ADDING A NEW STATIC PRIVATE FOLDER

To add a new static folder, the user must click on the **FAVORITES** menu and, then, click on the **ADD NEW FOLDER** on the work space.



The screenshot displays the Eikon Documents 2007 web application interface. At the top left is the Eikon Documents logo. The top right shows the user's library name: "Library [Peter Silva]". Below the logo is a navigation bar with links: "Received tasks", "Sent tasks", "New document", "Lists", "Publications", "Favorites", "History", and "Logout". The "Favorites" link is highlighted with a red box. To the right of the navigation bar is a search bar with a "Search" button and a "Document Names" dropdown menu. Below the navigation bar, the "FAVORITES" section is visible, containing a table with three rows of favorite documents. To the right of the table, there is a "Add new Folder" button, which is also highlighted with a red box. Below the table, there is a timestamp "17/04/2011 13:12:54" and a footer with links for "Received tasks", "Sent tasks", "New document", "Lists", "Publications", "Favorites", "History", "Logout", "Password change", "Email change", "Home page change", "Mudar para Português", "User Guide", and "Links". The footer also includes the copyright notice: "Copyright © 1997-2010 Eikon Tecnologia Ltda. All rights reserved."

Type	Class	Name
		Ongoing work
	Book	Brazilian tales
	Book	Novels of Machado de Assis and Lima Barreto

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A form requiring the name of the new private static folder will show up and, if desired, the folder **CAN BE MARKED** for future documents linking.

ADD NEW FOLDER

Complete and submit the form

Name

Mark as recipient ☒

Library [Peter Silva]

[Received tasks](#) | [Sent tasks](#) | [New document](#) | [Lists](#) | [Publications](#) | [Favorites](#) | [History](#) | [Logout](#)

FAVORITES

Type	Class	Name
		If you liked this, see also...
		Ongoing work
	Book	Brazilian tales
	Book	Novels of Machado de Assis and Lima Barreto

☐ Add new Folder

☐ Add new Search in Book

17/04/2011 13:16:40


[Received tasks](#) | [Sent tasks](#) | [New document](#) | [Lists](#) | [Publications](#) | [Favorites](#) | [History](#) | [Logout](#)
[Password change](#) | [Email change](#) | [Home page change](#) | [Mudar para Português](#) | [User Guide](#) | [Links](#)
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MARKING A STATIC PRIVATE FOLDER

To mark a static private folder is to inform the software that the subsequent documents links will be done to the marked folder.

In addition all documents inserted after the marking will be automatically linked to the marked folder. The mark is valid only during the current work session. While the folder remains marked it will be displayed in the main menu.

Note: all documents that are linked to a selected folder are available to be associated to other documents.

To mark a folder, the user must open the folder and then click **MARK FOLDER** next to icon  on the work space.

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Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

 Mark Folder
Change Folder
Delete Folder
Generate report


ONGOING WORK


2 selected documents, in order of [Class/Name/Version]

	Class	Name	Version	State	Description	Last update	
	Book	RB-0020		Released	O Cemitério dos Vivos-Lima Barreto	14/05/2010 11:24:55	
	Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01	

See the result of marking the folder from the previous example when updating the page.


Library [Peter Silva]

 **Eikon Documents**





 Ongoing work

Search Document Names

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

 **ONGOING WORK**


2 selected documents, in order of [Class/Name/Version]

	Class	Name	Version	State	Description	Last update	
	Book	RB-0020		Released	O Cemitério dos Vivos-Lima Barreto	14/05/2010 11:24:55	
	Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01	



17/04/2011 13:21:45



Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout
Password change | Email change | Home page change | Mudar para Português | User Guide | Links
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LINKING A DOCUMENT TO THE MARKED FOLDER

A document is linked to the last marked private static folder, by clicking on **LINK DOCUMENT** next to the icon  located in the area of specific document commands.

BOOK: RB-0012

Files			
Name	Type	Size	Reserved
 gazela.rtf	Documento do Microsoft Word	260 kB	
 gazela.zip	Zip	88 kB	
Attributes			
Class Book			
Type Brazilian novels			
Number 0012			
Title A pata da gazela			
Author José de Alencar			
State Released			

 Send tasks
 Link document
Associate document
Show publications
Show related documents
Show history
Show tasks
Generate report

Eikon Documents 2007 User's Guide

The user may check the linking of the document to the folder by visiting the static private folder page indicated over the main menu.

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout


ONGOING WORK

3 selected documents, in order of [Class/Name/Version]


	Class	Name	Version	State	Description	Last update	
	Book	RB-0012		Released	A pata da gazela-José de Alencar	14/05/2010 11:24:51	
	Book	RB-0020		Released	O Cemitério dos Vivos-Lima Barreto	14/05/2010 11:24:55	
	Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01	

Unmark Folder
Generate report

DELETING THE LINK BETWEEN A DOCUMENT AND A FOLDER

To delete the link of any document to a private static folder, open the chosen folder and click the icon  located on line of any document whose link should be deleted. See the previous example.

DELETING A PRIVATE FOLDER

To delete a static private folder the user should click on **DELETE FOLDER** next to the icon  located in the specific folder commands. The folder will be deleted immediately. The documents linked above are not affected.

Note that only unmarked folders can be deleted.

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

ONGOING WORK

3 selected documents, in order of [Class/Name/Version]

	Class	Name	Version	State	Description	Last update	
	Book	RB-0012		Released	A pata da gazela-José de Alencar	14/05/2010 11:24:51	
	Book	RB-0020		Released	O Cemitério dos Vivos-Lima Barreto	14/05/2010 11:24:55	
	Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01	

Mark Folder
Change Folder
 Delete Folder
Generate report

USING STATIC PRIVATE FOLDERS TO CREATE ASSOCIATIONS BETWEEN DOCUMENTS

The static private folders are also used to create associations between documents, using the web standard interface. The documents linked to the **MARKED** private static folder are available, at any time, to be associated to the document presented on the screen.

ASSOCIATING DOCUMENTS

Authorized users can associated any document to other documents of interest. This enables the establishment of a chain of relationships that enriches and facilitates the understanding of the organization operations, businesses, products, processes, etc.

INSERTION OF ASSOCIATIONS

The process of creating associations in the standard web interface involves three steps:

1. Insertion and marking of a new private static folder - *an existing folder can also be marked.*
2. Linking one or more documents to the previously marked folder.
3. Associating a chosen document to the documents linked to the previously marked folder.

EXAMPLE OF ASSOCIATION BETWEEN "TWO BOOKS"

To help to clarify the procedure for establishing relationships let's use the following example. A reader of books, Mr. Peter da Silva, would like to recommend another book for users who eventually enjoyed reading the book "Memórias Póstumas de Braz Cubas". He must do the following:

1. Insertion and marking of a new private static folder by the name "If you liked this, also read..."

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2. Retrieving the document with the book to be recommended – **ASSOCIATED** - and linking it to the folder
3. Retrieving the document that will be associated
4. Insertion of the association

The step by step procedure is illustrated in the following images.

ADD NEW FOLDER

Complete and submit the form

Name

Mark as recipient ☒

Library [Peter Silva]

[Received tasks](#) | [Sent tasks](#) | [New document](#) | [Lists](#) | [Publications](#) | [Favorites](#) | [History](#) | [Logout](#)

FAVORITES

Type	Class	Name
		If you liked this, see also...
		Ongoing work
	Book	Brazilian tales
	Book	Novels of Machado de Assis and Lima Barreto

☐ Add new Folder

☐ Add new Search in Book

17/04/2011 13:16:40

[Received tasks](#) | [Sent tasks](#) | [New document](#) | [Lists](#) | [Publications](#) | [Favorites](#) | [History](#) | [Logout](#)
[Password change](#) | [Email change](#) | [Home page change](#) | [Mudar para Português](#) | [User Guide](#) | [Links](#)
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Library [Peter Silva]

Eikon Documents

If you liked this, see also...

Search All Document Metadata

Received tasks Sent tasks New document Lists Publications Favorites History Logout

BOOK: RB-0009

Files			
Name	Type	Size	Reserved
dom_casmurro.rtf	Documento do Microsoft Word	701 kB	
dom_casmurro.zip	Zip	179 kB	

Attributes	
Class	Book
Type	Brazilian novels
Number	0009
Title	Dom Casmurro
Author	Machado de Assis
State	Released

Send tasks
Link document
Associate document
Show publications
Show related documents
Show history
Show tasks
Generate report

Unmark Folder
Generate report

IF YOU LIKED THIS, SEE ALSO...

1 selected document

Class	Name	Version	State	Description	Last update
Book	RB-0009		Released	Dom Casmurro-Machado de Assis	14/05/2010 11:24:49

QUICK SEARCH FOR [BRAZ CUBAS] ON ALL DOCUMENT METADATA

Only last version

1 selected document

Class	Name	Version	State	Description	Last update
Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01

Library [Peter Silva]

Eikon Documents

If you liked this, see also...

Search All Document Metadata

Received tasks Sent tasks New document Lists Publications Favorites History Logout

BOOK: RB-0031

Files			
Name	Type	Size	Reserved
Memórias Póstumas de Braz Cubas.pdf	Adobe Acrobat Document	413 kB	

Attributes	
Class	Book
Type	Brazilian novels
Number	0031
Title	Memórias póstumas de Braz Cubas
Author	Machado de Assis
State	Released

Send tasks
Link document
Associate document
Show publications
Show related documents
Show history
Show tasks
Generate report
My task

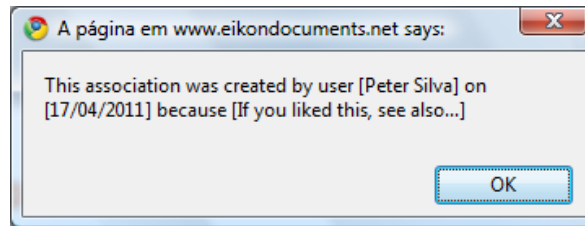
Eikon Documents 2007 User's Guide

BOOK: RB-0031 - RELATED DOCUMENTS

There is available one related document


Class	Name	Version	State	Description	Last update		
Book	RB-0009		Released	Dom Casmurro-Machado de Assis	14/05/2010 11:24:49		

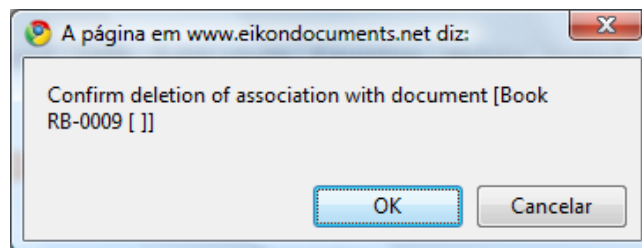
Document main page



Note: Only users who have full permission can insert and delete relationships.

DELETING AN ASSOCIATION

To delete a relationship, click on the icon  and confirm.



ADDING A NEW DOCUMENT

To add a new document, the user must click on **NEW DOCUMENT** on the main menu, and then decide to which class the new document should belong to and in what state of the class lifecycle the document should be included.

The available options are displayed on the work space. See example below.

The screenshot shows the Eikon Documents 2007 web application interface. At the top, there is a header with the Eikon logo and the text 'Eikon Documents'. Below the header is a navigation bar with the following items: Received tasks, Sent tasks, **New document** (highlighted with a red box), Lists, Publications, Favorites, History, and Logout. To the right of the navigation bar is a search bar with a 'Search' button and a dropdown menu labeled 'Document Names'. Below the navigation bar, there is a section titled 'ADD BOOK [REGISTERING]' in orange text. To the right of this section is a button labeled 'Add new' with a dropdown menu showing 'Projeto Executivo [Listado]' (highlighted with a red box). Below the 'ADD BOOK [REGISTERING]' section is a form titled 'Complete and submit the form'. The form has the following fields: 'Type' (a dropdown menu with 'Brazilian history founders' selected), 'Number' (a text field with the value '{auto}' and a small dropdown arrow), 'Title' (a text field), and 'Author' (a text field). Below the form are two buttons: 'Submit' and 'Clear'. At the bottom of the page, there is a footer with the date '17/04/2011 13:56:55' and a list of links: Received tasks, Sent tasks, New document, Lists, Publications, Favorites, History, Logout, Password change, Email change, Home page change, Mudar para Português, User Guide, and Links. Below the footer is a copyright notice: 'Copyright © 1997-2010 Eikon Tecnologia Ltda. All rights reserved.'

ADD PROJETO EXECUTIVO [LISTADO]

The screenshot shows the Eikon Documents 2007 web application interface. At the top, there is a header with the Eikon logo and the text 'Eikon Documents'. Below the header is a navigation bar with the following items: Received tasks, Sent tasks, **New document** (highlighted with a red box), Lists, Publications, Favorites, History, and Logout. To the right of the navigation bar is a search bar with a 'Search' button and a dropdown menu labeled 'Document Names'. Below the navigation bar, there is a section titled 'ADD PROJETO EXECUTIVO [LISTADO]' in orange text. To the right of this section is a button labeled 'Add new' with a dropdown menu showing 'Book [Registering]' (highlighted with a red box). Below the 'ADD PROJETO EXECUTIVO [LISTADO]' section is a form titled 'Complete and submit the form'. The form has the following fields: 'Tipo' (a dropdown menu with 'Folha de Dados' selected), 'Instalação' (a dropdown menu with 'Ribeirão Preto' selected), 'Área de atividade' (a dropdown menu with 'Tancagem de álcool' selected), and 'Classe de serviço' (a dropdown menu with '100-CONSTRUÇÃO CIVIL, ARQUITETURA & URBANISMO' selected).

FORM FOR INSERTION OF A NEW DOCUMENT

Fill in the form with the attributes values that characterize the new document.

- If an asterisk * is displayed on the right of the name of an attribute, the user can select multiple values for this attribute - use [CTRL] + [SHIFT].
- Use the **CLEAR** button to reset the form.
- Use the **SUBMIT** button to send the informed values to the server.

ADD BOOK [REGISTERING]

Complete and submit the form

Type:

Number:

Title:

Author:

Add new
Projeto Executivo
[Listado]

After clicking the **SUBMIT** button, the server will confirm the insertion of the new document showing the just included document page. Thereafter, the user can add content to the document, change the values of their attributes or perform other activities.

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

BOOK: RB-0032

Name	Type	Size	Reserved
Attributes			
Class	Book		
Type	Brazilian novels		
Number	0032		
Title	Aventuras de Diófanos		
Author	Teresa Margarida de Silva e Orta		
State	Registering		

- Send tasks
- Show publications
- Show related documents
- Show history
- Show tasks
- Generate report
- Add content
- Change attributes
- Delete document
- Release




ADDING A NEW VERSION OF AN EXISTING DOCUMENT

Certain classes, at the discretion of the Application Administrator, may support multiple versions of documents. Under this condition, a user who possesses the **FULL** permission type for the current state of a document can easily create a new version.

Eikon Documents 2007 User's Guide

Click on **ADD NEW VERSION** on the specific document commands menu and fill in and submit the resulting form.

DED: CR-4450.74-6521-862-RKO-001 [0]

Files			
Name	Type	Size	Reserved
 CR-4450.74-6521-862-RKO-001=0.pdf	PDF Document	544 kB	 
Attributes			
Class DED			
Idiom Portuguese			
Type CR-Cronograma / Schedule			
Installation area 4450.74-Gasoduto Cacimbas - Catu			
System number 6521-Gasoduto			
Class of service 862-PLC			
Originator code RKO - ROCKWELL			
Sequential number 001			
Revision 0			
Status Para comentários / For comments			
Discipline Instrumentação / Instrumentation			
Document title Cronograma de Montagem e Fabricação / Assembly and Manufacturing schedule			

- Send tasks
- Show publications
- Show related documents
- Show other versions
- Show history
- Show tasks
- Add new version**
- Generate report
- Add content
- Change attributes
- Register change from Approved with comments*
- Voltar

During the filling of the form, the user must fill new values on the attributes of type *version – labels in italics*. Optionally, other attribute's values can be modified and the contents of the previous version can be copied - **CLONING OF FILES**.

ADD NEW VERSION FOR DED: CR-4450.74-6521-862-RKO-001 [0]

State: ☒ Copy content

Enter the attributes's values of the document new version

Idiom

Portuguese

Type

CR-Cronograma / Schedule

Installation area

4450.74-Gasoduto Cacimbas - Catu

System number

6521-Gasoduto

Class of service

862-PLC

Originator code

RKO - ROCKWELL

Sequential number

001

Revision

A

Status

Para comentários / For comments

Discipline

Instrumentação / Instrumentation

Document title

Cronograma de Montagem e Fabricação / Assembly and Manufacturing schedule

After clicking on the **SUBMIT** button the records corresponding to the new document will be created and the new document version page will be presented.

ADDING CONTENT TO A DOCUMENT

Adding content to a document means adding one or more files at the same time. This feature is only available for documents whose state in its life cycle allows **EDITING** and only to users with **FULL** permission.

To add one or more files click **ADD CONTENT** to the right side of the icon  located in the specific document commands area.

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

BOOK: RB-0032

Files	
Name	Type
Class Book	
Type Brazilian novels	
Number 0032	
Title Aventuras de Diófanos	
Author Teresa Margarida de Silva e Orta	
State Registering	

- Send tasks
- Show publications
- Show related documents
- Show history
- Show tasks
- Generate report
- Add content**
- Change attributes
- Delete document
- Release

After executing the command, the portal will display a form like this one.

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

Allowed File Types

BOOK: RB-0032

Add content

Complete and submit the form

☒ Check-out for editing until 18/04/2011

C:\Users\Sergio\Documents\Compras\Aventuras_de_Diófanos.pdf

Procurar...

Procurar...

Procurar...

Procurar...

Procurar...

Submit

[Document main page](#)

ALLOWED FILE TYPES

Clicking on the command **ALLOWED FILE TYPES** the portal will display a list of allowed file types, as the following example.

ALLOWED FILE TYPES

Type	Extension	Content type (MIME)
Adobe Acrobat Document	.pdf	application/pdf
Arquivo texto	.txt	text/plain
Autocad DWF	.dwf	drawing/x-dwf
AutoCAD.Drawing	.dwg	image/vnd.dwg
Documento de imagem TIF	.tif	image/tif
Documento do Microsoft Word	.doc	application/msword
Excel	.xlsx	Application/xlsx
Formato Rich Text (RTF)	.rtf	text/richtext
Imagem GIF	.gif	image/gif
Imagem JPEG	.jpg	image/jpeg
Internet E-Mail Message	.eml	message/rfc822
Planilha de Excel	.xls	Application/XLS
Planilha do Microsoft Excel	.xls	application/vnd.ms-excel
Word 2007	.docx	application/vnd.openxmlformats-officedocument.wordprocessingml.document
Zip	.zip	application/x-zip-compressed
Zip File	.zip	application/x-zip-compressed

FILE UPLOAD

Click on [Browse ...] or equivalent and locate the file you wish to add to the document. The user can only choose allowed file types. This form allows you to add multiple files at once – *up to five files*.

Mark the check-box **CHECK-OUT FOR EDITING UNTIL** and inform the target date if the user decides to already check-out the file to be uploaded.

To upload the selected files click on the **SUBMIT** button. This may take some time as the uploading time depends on the size of the file(s) and on the connection bandwidth. *It is recommended that you wait for the completion of the operation before doing any other activity on the browser.*

The document's page will be refreshed when the upload operation is completed.

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Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

BOOK: RB-0032

Files			
Name	Type	Size	Reserved
Aventuras_de_Diófanes.pdf	Adobe Acrobat Document	39 kB	Peter Silva 18/04/2011

Attributes

Class	Book
Type	Brazilian novels
Number	0032
Title	Aventuras de Diófanes
Author	Teresa Margarida de Silva e Orta
State	Registering

Send tasks
Show publications
Show related documents
Show history
Show tasks
Generate report
Add content
Change attributes

MODIFYING THE CONTENTS OF A DOCUMENT

The contents of a document may be modified by performing the following tasks:

- Check-out a file for editing
- Cancel the check-out
- Replacement of the checked-out file - *check-in*
- File deletion

These features are available only to authorized users and documents whose **STATE** in their life cycle allows them to be edited.

FILE REPLACEMENT - CHECK-OUT

On the document page click on the icon at the right side of the name of the file that will be replaced to start the check-out procedure.

BOOK: RB-0032

Files			
Name	Type	Size	Reserved
Aventuras_de_Diófanes.pdf	Adobe Acrobat Document	39 kB	

Attributes

Class	Book
Type	Brazilian novels
Number	0032

Check-out button

Send tasks
Show publications
Show related documents
Show history
Show tasks
Generate report
Add content
Change attributes
Delete document
Release

After clicking on the icon, the portal will ask for an expected file's *check-in* date, as the following example.

BOOK: RB-0032

[Aventuras_de_Diófanes.pdf]

Check-out for editing until: 19/04/2011



Check-Out

After the submission of the check-in estimated date, the document's page will be refreshed.

Note that as long as there are any checked-out files, the document cannot change state or be deleted.

BOOK: RB-0032

Files			
Name	Type	Size	Reserved
Aventuras_de_Diófanes.pdf	Adobe Acrobat Document	39 kB	Peter Silva 19/04/2011
Attributes			
Class Book			
Type Brazilian novels			
Number 0032			
Title Aventuras de Diófanes			

Cancel check-out button

Check-in button

- Send tasks
- Show publications
- Show related documents
- Show history
- Show tasks
- Generate report
- Add content
- Change attributes

CANCELLING A FILE CHECK-OUT

Click on the icon at the right side of the checked-out file name, such as the above example. The check-out will be immediately cancelled.

Note that the user cannot cancel the file check-out performed by other users.

REPLACING THE CHECKED-OUT FILE

To perform a file check-in, click on the icon at the right side of the checked-out file, following the previous example. The user may now browse and submit the file replacement on the displayed form.

Note that a user cannot replace - check-in - another user's checked-out file.

BOOK: RB-0032

[Aventuras_de_Diófanes.pdf]

Inform edited file location and submit

☒ Check-out for editing until 18/04/2011

C:\Users\Sergio\Documents\Compras\Aventuras_de_Diófanes.pdf Procurar...



Submit

After submitting the file replacement, the existing *check-out* will be automatically canceled, unless that on the replacement form the user has entered a new check-out target date.

RECOVERING ANY PREVIOUS INSTANCE OF A FILE

When a file is replaced by a newer one through the **CHECK-OUT AND CHECK-IN PROCESS**, the server software does not eliminate any file instance from the repository. To start the recovery process of the previous file instance, click on the command **SHOW HISTORY** located in the document's specific commands workspace.

BOOK: RB-0032

Files				
	Name	Type	Size	Reserved
R	 Aventuras_de_Diófanes.pdf	Adobe Acrobat Document	39 kB	 Peter Silva 18/04/2011
Attributes				
Class Book				
Type Brazilian novels				
Number 0032				
Title Aventuras de Diófanes				

- Send tasks
- Show publications
- Show related documents
- Show history
- Show tasks
- Generate report
- Add content
- Change attributes

After the presentation of the document's events history, find the file replacement of interest and click on the file name. The previously replaced file download process will start immediately.

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BOOK: RB-0032 - HISTORY

Click on the replaced file name to recover this file instance

Added by	Added in	Last updated by	Last updated
Peter Silva	17/04/2011 14:16:37	Peter Silva	17/04/2011 14:56:33


Events occurring from 10/04/2011 until 17/04/2011

7 events occurred in the period

User	State	File	Event	Date/Time
Peter Silva	Registering	Aventuras_de_Diófanes.pdf	File checked-out	17/04/2011 14:56:33
Peter Silva	Registering	Aventuras_de_Diófanes.pdf	File replaced	17/04/2011 14:56:33
Peter Silva	Registering	Aventuras_de_Diófanes.pdf	File checked-out	17/04/2011 14:51:50
Peter Silva	Registering	Aventuras_de_Diófanes.pdf	Check-out canceled	17/04/2011 14:46:50
Peter Silva	Registering	Aventuras_de_Diófanes.pdf	File checked-out	17/04/2011 14:43:54
Peter Silva	Registering	Aventuras_de_Diófanes.pdf	File added	17/04/2011 14:43:54
Peter Silva	Registering		Document added	17/04/2011 14:16:37

[Document main page](#)






EDITING THE FILE NAME









Click on the icon  located just to the right side of the file name to be changed.

Note that a user cannot change name of files checked-out by other users.

BOOK: RB-0032

Click this button to rename the file

Files				
Name	Type	Size	Reserved	
 Aventuras_de_Diófanes.pdf	Adobe Acrobat Document	39 kB	 Peter Silva 18/04/2011	  
Attributes				
Class Book				
Type Brazilian novels				
Number 0032				

-  Send tasks
-  Show publications
-  Show related documents
-  Show history
-  Show tasks
-  Generate report
-  Add content
-  Change attributes


Fill in the displayed form to change the filename.

BOOK: RB-0032

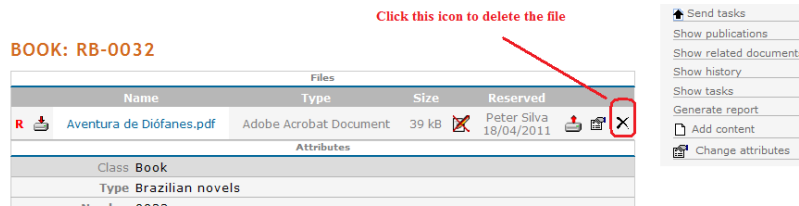
[Aventuras_de_Diófanes.pdf]

New file name

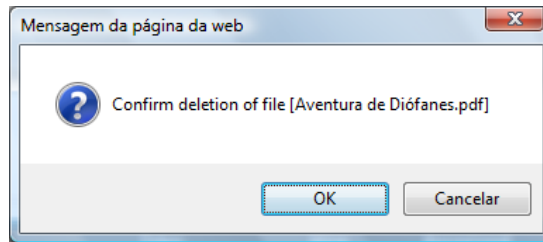
DELETING A FILE

Click on the icon  at the right side on the line of the file that is going to be deleted.

Eikon Documents 2007 User's Guide




The file will be deleted after confirmation.



Note that a user cannot delete files checked-out by other users.

EDITING THE DOCUMENT ATTRIBUTES

Click on **CHANGE ATTRIBUTES** on the left side of the icon  located at the document's page command area to start the procedure for changing the values of attributes of the document by submitting a form.

This feature is only available for documents whose status in their life cycle allows editing and, of course, only to authorized users.

Values of attributes that ARE PART OF THE DOCUMENT NAME OR DOCUMENT VERSION cannot be changed and are not presented on the attributes editing form.

See the following example:

Eikon Documents 2007 User's Guide

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

BOOK: RB-0032

Files			
Name	Type	Size	Reserved
Aventura de Diófanos.pdf	Adobe Acrobat Document	39 kB	

Attributes	
Class	Book
Type	Brazilian novels
Number	0032
Title	Aventuras de Diófanos
Author	Teresa Margarida de Silva e Orta
State	Registering

- Send tasks
- Show publications
- Show related documents
- Show history
- Show tasks
- Generate report
- Add content
- Change attributes**
- Delete document
- Release

BOOK: RB-0032 - CHANGE ATTRIBUTES

Complete and submit the form

Title

Author

Document main page

CHANGING THE DOCUMENT STATE

This feature is only available to users who have full permission, provided that the document does not have any checked-out file.

Click the text corresponding to the desired **DOCUMENT TRANSITION STATE ACTION**. The texts with the names of the available actions are presented at the document's page command area on the right side of icons. ➡

See the example below.

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

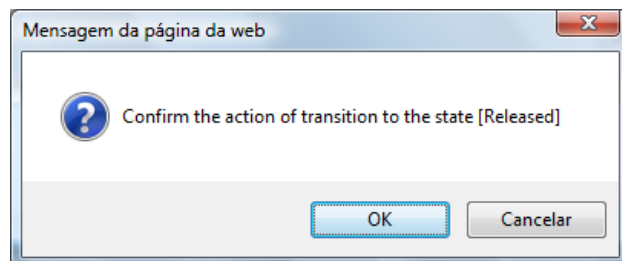
BOOK: RB-0032

Files			
Name	Type	Size	Reserved
Aventura de Diófanos.pdf	Adobe Acrobat Document	39 kB	

Attributes	
Class	Book
Type	Brazilian novels
Number	0032
Title	Diophanes adventures
Author	Teresa Margarida de Silva e Orta
State	Registering

- Send tasks
- Show publications
- Show related documents
- Show history
- Show tasks
- Generate report
- Add content
- Change attributes
- Delete document
- Release**

The user must confirm the action after clicking the text corresponding to the chosen action.



After confirmation, the document will change state and the document's page will be refreshed. Observe, on the example, that several icons associated with previously authorized procedures have disappeared.

Received tasks
Sent tasks
New document
Lists
Publications
Favorites
History
Logout

BOOK: RB-0032

Files			
Name	Type	Size	Reserved
Aventura de Diófanos.pdf	Adobe Acrobat Document	39 kB	

Attributes

Class	Book
Type	Brazilian novels
Number	0032
Title	Diophanes adventures
Author	Teresa Margarida de Silva e Orta
State	Released

- Send tasks
- Show publications
- Show related documents
- Show history
- Show tasks
- Generate report

PUBLISHING DOCUMENTS

To publish a document which means to link a document to a static public folder, it is necessary to perform the following tasks:

1. Mark a static public folder
2. Link the document to the marked folder

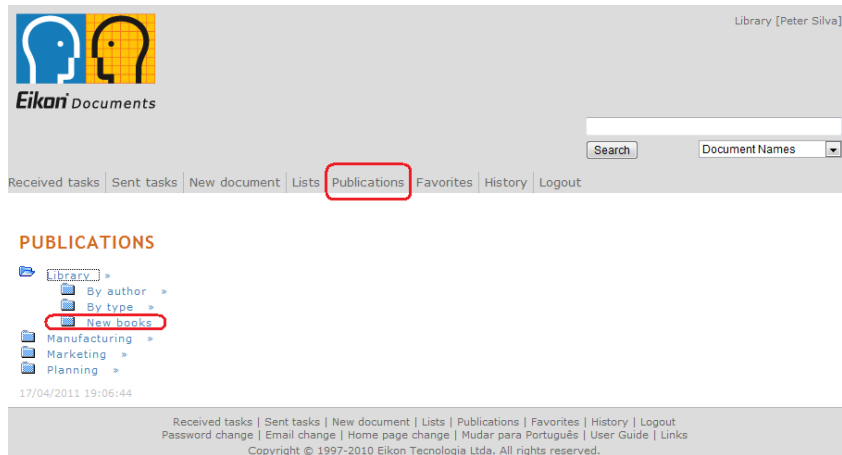
The document publications are modified through the following tasks:

- Check the publications of the document


- Change or delete the publications of the document

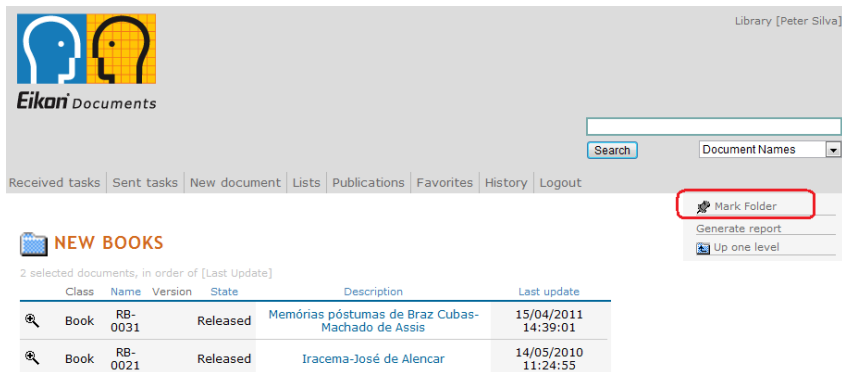
MARKING A PUBLIC FOLDER

Click on the **PUBLICATIONS** menu and select the desired public folder name, as in the following example.




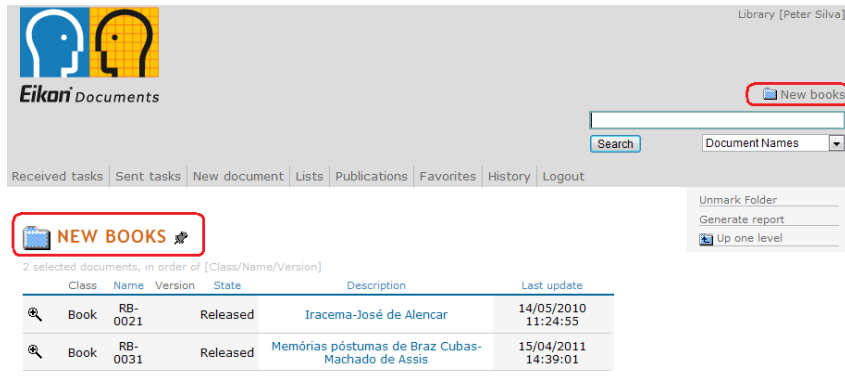
The current content of the selected public folder will be displayed, in accordance with the user access permissions.

Click on **MARK FOLDER** on the right side of the icon  located on the work space.



Eikon Documents 2007 User's Guide



The icon  will be added to the right of the folder name, confirming that the public folder has been selected to receive subsequent document linking. Moreover, the page header will now present a direct link to the folder page.



Library [Peter Silva]


NEW BOOKS

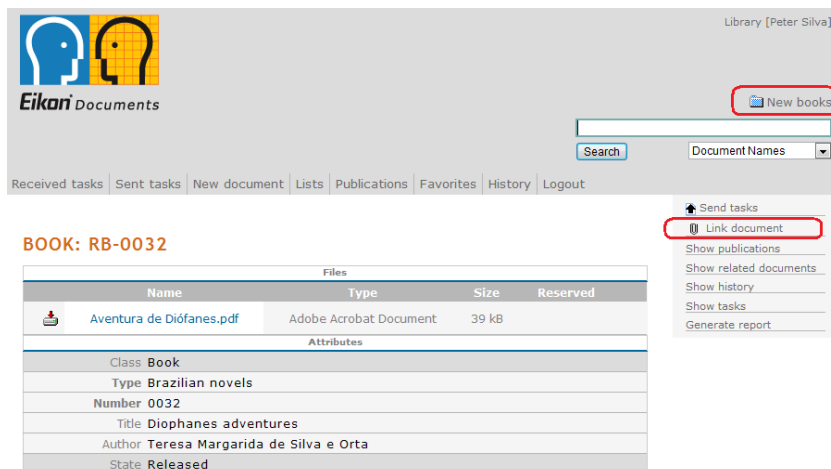
2 selected documents, in order of [Class/Name/Version]

	Class	Name	Version	State	Description	Last update
	Book	RB-0021		Released	Iracema-José de Alencar	14/05/2010 11:24:55
	Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01

Unmark Folder
Generate report
Up one level


PUBLISHING A DOCUMENT IN THE MARKED FOLDER

After locating the document of interest and accessing its document page, click on **LINK DOCUMENT** at the right of the icon  located on the command area. See the following example:



Library [Peter Silva]

BOOK: RB-0032

Files			
Name	Type	Size	Reserved
 Aventura de Diófanos.pdf	Adobe Acrobat Document	39 kB	

Attributes

Class	Book
Type	Brazilian novels
Number	0032
Title	Diophanes adventures
Author	Teresa Margarida de Silva e Orta
State	Released

Send tasks
Link document
Show publications
Show related documents
Show history
Show tasks
Generate report


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A form will be displayed where the user may inform the document publication period on the folder previously marked.

PUBLISH [BOOK: RB-0032] EM [NEW BOOKS]

Complete and submit the form

☒ Perpetual

Start 

End 

The linking of the document to the static public folder will be confirmed by displaying an updated list of publications of the document.

BOOK: RB-0032 - PUBLICATIONS

There is one linkage of this document to public static folders

Folder	Type	Start	End	Responsible	Date		
 New books	Perpetual			Peter Silva	17/04/2011 19:17:59		


[Document main page](#)

VERIFYING THE DOCUMENT PUBLICATIONS

Click on the **SHOW PUBLICATIONS** menu located in the document commands area.

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

BOOK: RB-0032

Files			
Name	Type	Size	Reserved
 Aventura de Diófanos.pdf	Adobe Acrobat Document	39 kB	
Attributes			
Class Book			
Type Brazilian novels			
Number 0032			
Title Diophanes adventures			
Author Teresa Margarida de Silva e Orta			
State Released			

- Send tasks
- Link document
- Show publications
- Show related documents
- Show history
- Show tasks
- Generate report

The list of document publications will be displayed on the work space.

BOOK: RB-0032 - PUBLICATIONS

There is one linkage of this document to public static folders

Folder	Type	Start	End	Responsible	Date		
 New books	Perpetual			Peter Silva	17/04/2011 19:17:59		

[Document main page](#)

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By clicking on any folder name on the document publications list, the user will open up the corresponding folder page.

The screenshot shows the Eikon Documents 2007 web application. At the top, there's a header with the Eikon logo and the text 'Eikon Documents'. Below the header is a navigation bar with links: Received tasks, Sent tasks, New document, Lists, Publications, Favorites, History, and Logout. On the right side of the header, there's a search bar with a 'Search' button and a dropdown menu for 'Document Names'. Below the navigation bar, there's a section titled 'NEW BOOKS' with a sub-header '3 selected documents, in order of [Class/Name/Version]'. This section contains a table with columns: Class, Name, Version, State, Description, and Last update. The table lists three books: 'Iracema-José de Alencar', 'Memórias póstumas de Braz Cubas-Machado de Assis', and 'Diophanes adventures-Teresa Margarida de Silva e Orta'. To the right of the table, there are links: 'Unmark Folder', 'Generate report', and 'Up one level'. At the bottom of the page, there's a footer with a timestamp '17/04/2011 19:22:59' and a copyright notice: 'Copyright © 1997-2010 Eikon Tecnologia Ltda. All rights reserved.'

Class	Name	Version	State	Description	Last update
Book	RB-0021		Released	Iracema-José de Alencar	14/05/2010 11:24:55
Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01
Book	RB-0032		Released	Diophanes adventures-Teresa Margarida de Silva e Orta	17/04/2011 19:04:17

CHANGING OR CANCELLING THE PUBLICATION OF A DOCUMENT

After obtaining the list of document publications, click on the appropriate icon to change or cancel the document link to the static public folder.


BOOK: RB-0032 - PUBLICATIONS

There is one linkage of this document to public static folders

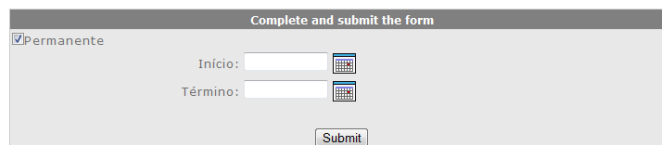
Folder	Type	Start	End	Responsible	Date	
New books	Perpetual			Peter Silva	17/04/2011 19:17:59	

[Document main page](#)

MODIFYING A PUBLICATION


After clicking on the icon  fill out the form and submit it to change the document publication period on that folder.

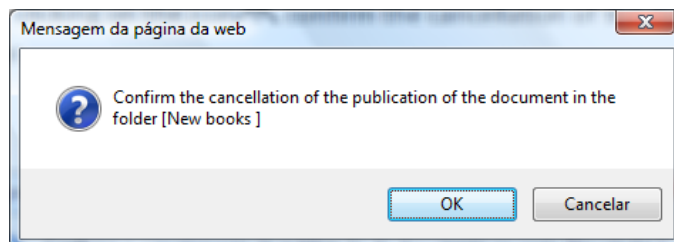
CHANGE PUBLICATION OF [BOOK: RB-0032] IN [NEW BOOKS]



A web form titled "Complete and submit the form". It contains a checked checkbox labeled "Permanente". Below this are two date input fields: "Inicio:" and "Término:", each with a calendar icon. At the bottom right is a "Submit" button.

CANCELLING A PUBLICATION

After clicking on the icon , confirm the cancellation of the document publication on that folder.



HISTORY

The software ensures complete traceability by logging all events encompassing:

- Access to documents' contents
- Change of documents' metadata
- Change of documents' contents

USER EVENTS


Click on the **HISTORY** menu to view the user events during a given period of time. The list of events involving the user during a given period will be displayed on the work space.

Change the start and/or end date and click **SUBMIT** to change the viewing period.

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The screenshot shows the Eikon Documents 2007 web interface. At the top left is the Eikon Documents logo. The top right shows the user's library name, "Library [Peter Silva]". Below the logo is a navigation bar with tabs: Received tasks, Sent tasks, New document, Lists, Publications, Favorites, History (highlighted with a red box), and Logout. To the right of the navigation bar is a search bar with a "Search" button and a "Document Names" dropdown menu. Below the navigation bar is a "New books" button. Below the search bar are two buttons: "Generate report (Excel)" and "Generate report (Html)". Below the navigation bar is a "HISTORY" section. It contains a date range selector: "Events occurring from 10/04/2011" (highlighted with a red box) and "until 17/04/2011" (highlighted with a red box), with a "Submit" button. Below the date range selector is a table with 7 columns: Class, Name, Version, State, File, Event, and Date/Time. The table contains 4 rows of data, each with a magnifying glass icon in the first column (highlighted with a red box).

Class	Name	Version	State	File	Event	Date/Time
Book	RB-0032		Released		Document state changed	17/04/2011 19:04:17
Book	RB-0032		Registering		Attributes changed	17/04/2011 19:00:58
Book	RB-0032		Registering	Aventura de Diófanos.pdf	Check-out canceled	17/04/2011 18:56:07
Book	RB-0032		Registering	Aventura de Diófanos.pdf	File renamed	17/04/2011 18:52:46

The user can directly obtain the details of the listed documents by clicking on the corresponding icons .

DOCUMENT EVENTS

Click on the command **SHOW HISTORY** located at the specific document's command area to view the events during a particular period, as shown below.


Note that this feature is only available to users who have full permission for the current state of the document.

The list of events involving the document during a given period of time will be displayed on the work space. Change the start and/or end date and click on **SUBMIT** to change the viewing period.

Eikon Documents 2007 User's Guide


Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout


BOOK: RB-0032


Files			
Name	Type	Size	Reserved
 Aventura de Diófanos.pdf	Adobe Acrobat Document	39 kB	


Attributes


Class	Book
Type	Brazilian novels
Number	0032
Title	Diophanes adventures
Author	Teresa Margarida de Silva e Orta
State	Released


 Send tasks


 Link document

 Show publications

 Show related documents

 Show history

 Show tasks

 Generate report

BOOK: RB-0032 - HISTORY

Added by	Added in	Last updated by	Last updated
Peter Silva	17/04/2011 14:16:37	Peter Silva	17/04/2011 19:04:17

Events occurring from  until 

11 events occurred in the period

User	State	File	Event	Date/Time
Peter Silva	Released		Document state changed	17/04/2011 19:04:17
Peter Silva	Registering		Attributes changed	17/04/2011 19:00:58
Peter Silva	Registering	Aventura de Diófanos.pdf	Check-out canceled	17/04/2011 18:56:07
Peter Silva	Registering	Aventura de Diófanos.pdf	File renamed	17/04/2011 18:52:46
Peter Silva	Registering	Aventuras_de_Diófanos.pdf	File checked-out	17/04/2011 14:56:33
Peter Silva	Registering	Aventuras_de_Diófanos.pdf	File replaced	17/04/2011 14:56:33
Peter Silva	Registering	Aventuras_de_Diófanos.pdf	File checked-out	17/04/2011 14:51:50
Peter Silva	Registering	Aventuras_de_Diófanos.pdf	Check-out canceled	17/04/2011 14:46:50
Peter Silva	Registering	Aventuras_de_Diófanos.pdf	File checked-out	17/04/2011 14:43:54
Peter Silva	Registering	Aventuras_de_Diófanos.pdf	File added	17/04/2011 14:43:54
Peter Silva	Registering		Document added	17/04/2011 14:16:37

[Document main page](#)


CHANGING USER PREFERENCES

HOME PAGE AND INITIAL SEARCH PREFERENCE

Click on the **HOME PAGE CHANGE** item at the secondary menu and choose the preferred page to be displayed after login. Options available: Received tasks - *default*, Sent tasks, History, Publications, Favorites and Lists.

The user can also change her initial search preference, choosing among available options.

Eikon Documents 2007 User's Guide

 **RECEIVED TASKS**

Due from until ☒ Only not completed ☒ Include "AUTO"

1 selected task

Due	From	Type	Task	Document	Description	State	Status
18/04/2011	Librarian	For your information	This is a very interesting book.	Book: RB-0031	Memórias póstumas de Braz Cubas-Machado de Assis	Released	

17/04/2011 19:40:19

[Received tasks](#) | [Sent tasks](#) | [New document](#) | [Lists](#) | [Publications](#) | [Favorites](#) | [History](#) | [Logout](#)
[Password change](#) | [Email change](#) | [Home page change](#) | [Mudar para Português](#) | [User Guide](#) | [Links](#)
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Click to change the home page

HOME PAGE CHANGE

Complete and submit the form

Home page

Initial search on

EMAIL

Click on **THE EMAIL CHANGE** item at the secondary menu. Fill in the displayed form and submit it.

EMAIL CHANGE

Complete and submit the form

New email

Confirm new email

User

17/04/2011 19:46:09

[Received tasks](#) | [Sent tasks](#) | [New document](#) | [Lists](#) | [Publications](#) | [Favorites](#) | [History](#) | [Logout](#)
[Password change](#) | [Email change](#) | [Home page change](#) | [Mudar para Português](#) | [User Guide](#) | [Links](#)
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PASSWORD

Click on the **PASSWORD CHANGE** item at the secondary menu. Fill in the displayed form and submit it.

PASSWORD CHANGE

Complete and submit the form

New password

Confirm new password

Current password

User

17/04/2011 19:49:07

Received tasks
Password change

Sent tasks | New document | Lists | Publications | Favorites | History | Logout
Email change | Home page change | Mudar para Português | User Guide | Links

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